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ABSTRACT

Designed for the reference staff at the Golda Meir Library, University of Wisconsin-Milwaukee, this manual functions as a guide to insure a uniform standard of service, to explain the duties and responsibilities of the reference staff, and to provide step-by-step explanations of how a variety of procedures are performed. The purpose of the reference room is explained, the goals and ethics of the reference service are set forth, and the referrals policy is discussed. Detailed policies and procedures are presented for three areas: (1) Reference Department Staffing--librarians, library interns, information/microform student employees, other student employees, and civil service employees; (2) Reference Services--information desk, reference desk, mail requests, telephone service, interlibrary loan, database services, microforms area, bibliographic instruction, special services, and services not provided; and (3) Reference Collection--general collection policy, specific collection policies, location policies, and handling procedures. (KM)

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The University of Wisconsin-Milwaukee

The Golda Meir Library,

Milwaukee, Wisconsin

REFERENCE MANUAL

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

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November 1984

IR051700

This manual of Reference Department Policies and Procedures was prepared by the following members of the Golda Meir Library reference staff at the University of Wisconsin-Milwaukee:

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REFERENCE DEPARTMENT POLICIES AND PROCEDURES

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I. INTRODUCTION

A. Purpose of the Policies and Procedures Manual

1. General Statement

The Policies and Procedures Manual serves at least three functions: it is a guide to insure a uniform standard of service of the highest possible quality consistent with the available resources; it is an explanation of the duties and responsibilities of the various members of the Reference Staff; and it is a step-by-step explanation of how a variety of procedures are performed.

2. Uses

The Policies and Procedures Manual serves as a training manual for new staff, a reference guide for experienced staff, and a source of authoritative answers for questions from the Library Administration, the University community, and individual users.

3. Availability

The Manual is a public document and available to any library user who wishes to see it.

4. Annual Review of Contents

The contents of the Manual will be reviewed annually and appropriate additions, deletions, or modifications made.

B. Purpose of the Reference Room

1. The Reference Room is the starting point for most library research; its resources are heavily used; and it is an instructional area. Therefore, it cannot be designated as a quiet study area of the library. Unnecessary and excessive noise, however, will not be tolerated. Seating in the Reference Room is limited, and patrons using the resources of the room have priority.

2. The Reference Collection includes materials of a generally recognized reference value and reflects the major interests and disciplines of the University, subject to space limitations and the discretion of the reference staff. Material in the Reference Collection is also selected on the basis of frequency of use and the patrons' need for staff assistance. In general, the items held in the Reference Collection are the most current editions available.

C. Goals of Reference Service

1. General Policy Statement

The Reference Department (Reference Public Services, Interlibrary Loan (ILL), Data Base Services (DBS), and Microforms Area) is one unit of the Golda Meir Library and the Library is one unit of the University of Wisconsin-Milwaukee. Therefore, the services provided by the Reference Staff reflect the goals of the Library and the University. The quality of service, however, is the responsibility of each Reference Staff member, who will maintain the highest possible standards within the resources provided by the Library Administration.

2. Basic Philosophy

Service to patrons is one of the primary duties of the Reference Staff, and the thrust of this service is to instruct patrons in the use and interpretation of the Library, with the emphasis on the Reference Collection and services. Compilation of bibliographies (with the exception of Data Base Services searches) is not within the scope of our reference service. Service is provided to all patrons who use our facilities; however, because some services are extended only to UWM faculty, staff and students, we reserve the right to ask for identification.

3. Approachability

Reference staff on desk duty must be constantly aware of how approachable they appear to library users who are in need of assistance. Being approachable is a first step in encouraging users to seek assistance at the desks. Users need to be educated to the fact that individual assistance is the primary responsibility of staff on desk duty and that reference staff members are interested in the problems that face library users and are willing to help. Since the attitude and behavior of staff on duty goes a long way towards creating an image of the entire library, reference staff should strive to make that image a positive one.

4. On Call

All reference librarians, even though they are not scheduled at the desk, are on call to help during busy periods or when specific questions requiring their subject expertise arise.

D. Ethics of Reference Service

1. Confidentiality

The needs of library users must always be taken seriously and treated with the utmost respect. Under no circumstances should there be any discussion of an individual or a group of users, or of any transaction between user and reference staff member, outside of a professional context.

2. Legal and Medical Questions

Reference personnel may help a patron find legal or medical reference sources, but due to the legal implications, staff members may not interpret the material or give advice.

3. Encyclopedia/Dictionary/Reference Book Recommendations

Reference personnel should direct patrons to evaluative materials concerning such purchases, but should not recommend particular purchases.

E. Referrals

A reasonable effort must be made to answer every reference question. A staff member who has been unable to answer a question satisfactorily should consult with colleagues for advice/assistance. If it appears that this combined expertise is still not adequate, then the patron may be referred to other appropriate services. Incompletely answered questions, or those for which information does not appear to be available, should be recorded and discussed with other staff members. If an answer or source of answer is found, it should be shared with all staff members.

II. REFERENCE DEPARTMENT STAFF

A. Librarians

1. Assigned Areas of the Collection

The Reference Department Administrator assigns each Reference Librarian to oversee a portion of the Reference Collection. In general, these assignments reflect the specific expertise of the individual librarians. Librarians assigned to a subject area are responsible for keeping abreast of new reference publications in that field, submitting orders for appropriate new materials, sending periodicals for binding, sending damaged books for repair or rebind, ordering replacements for missing items, and weeding.

2. Reference Policy and Review Committee (RPR)

The RPR Committee is composed of Librarians from all areas of the Reference Department (Reference Services, ILL, DBS) and the Reference Department Administrator. The Committee serves two major functions: to set policies and procedures for the Reference Department as a whole and to review and recommend items for purchase or cancellation.

As the need arises, the Reference Department Administrator schedules meetings and prepares the agenda for consideration of policies and procedures by the RPR Committee.

At the request of the Assistant Director for Collection Development, Committee members review and prepare written comments concerning serial and monographic titles under consideration for either purchase or cancellation. Committee members may also prepare reports in support of expensive serial/monographic orders and suggest cancellation of little-used reference serials, if necessary.

A file of all review and recommendation reports is located in the Reference Office and maintained by a Librarian designated by the Department Administrator.

Recommendations for retention or cancellation are based on the following criteria:

Relevancy to the UWM curriculum
Availability at another LCOMM library
Availability of information in another source in the Golda Meir Library
Accessibility of information via individual indexes or indexing and abstracting services
Accessibility via an on-line service available through DBS

3. Supervision of Student Employees

Each year at the beginning of the Summer Session, the Reference Department Administrator appoints a Librarian to a one year term as Supervisor of Student Employees. The Supervisor trains, schedules, and monitors the

performance of the Information/Microforms student staff and maintains the necessary records and statistics. The Supervisor is also responsible for interviewing and making recommendations concerning prospective Information/Microforms student employees.

The Reference Librarian on duty has responsibility for supervising the Reference Intern and Reference/Microforms students working during that time period. This includes providing training and monitoring performance. Any difficulties should be reported to the Supervisor of Student Employees.

Once each semester all Reference Department Librarians and the Supervisor of the Microforms Area are asked to evaluate the student employees they supervise. These evaluations become part of each student's employment record and are often used as the basis for pay increases.

4. Revision of the Card Catalog

Each Reference Librarian is assigned a portion of the Title Catalog to maintain. The assignment is made by the Assistant Director for Technical Services in conjunction with the Department Administrator.

When new cards are filed in the Card Catalog, a red flag is placed in front of each card with the tab to the right. Revision of the Card Catalog involves checking to make sure that the new cards have been filed accurately. If a card is in the correct place, pull the red flag. If a card is misfiled, transfer it to the correct place and insert a red flag with the tab to the left. If there is a question about where a card should be located, leave it where it is and reverse the red flag so that the tab is on the left. The Card Catalog Supervisor revises the cards that are flagged to the left.

Return the pulled red flags to the Card Catalog Supervisor. Flags of other colors should not be touched.

A copy of the filing rules is available at the Information Desk.

Reference Interns and Information Desk students also revise in the Title and Subject Catalogs, but they do not have assigned drawers. Currently, only catalogers are authorized to revise in the Author catalog.

5. Additional Assigned Responsibilities

The Reference Department Administrator may assign additional duties to the Librarians. Some of these assignments will be permanent or semi-permanent, others may be short-term or on a rotating basis. These assignments include, but are not limited to, the following:

Bibliographic instruction
Browsing Room
Check-in of new materials
DBS back-up
Displays
Documents
Infopass records
Loose-leaf services
Micro publishers catalog file
Pamphlet production
RPR file
Statistics
Student supervision
Special projects supervision
Stack maintenance

6. Committee Assignments

Either the Reference Department Administrator or the Library administration may assign Reference Staff members to Library, Campus, or state-wide committees.

B. Library Interns

From a slate of candidates recommended by the School of Library and Information Science, the Reference Department Administrator hires two Interns for a one year program that starts in September and ends in August of the following year. Interns are trained at both the Information and Reference Desks and gradually assume many of the responsibilities of a Reference Librarian.

Interns are scheduled to work up to 20 hours per week and may be asked to work either day or evening shifts and on weekends. They work under the guidance of the Reference Librarian on duty, but report to the Reference Department Administrator as their supervisor.

In addition to revising the Title and Subject Catalogs, Interns may be given additional project assignments by the Department Administrator, the Coordinator of Student Projects, or by any Reference Librarian who may have a short-term project to be worked on during a specific shift. Each Intern's performance is evaluated each semester by the Librarians and the Department Administrator. The Interns see their evaluations and have the opportunity to respond to them. The evaluation becomes a part of the Intern's employment record.

Interns who complete the one year program and continue in the Reference Department as Reference/Microforms student employees may, at the discretion of the Department Administrator, be given assignments that would normally require Intern status.

C. Information/Microforms Student Employees

Information/Microforms Student Employees are hired upon the recommendation of the Supervisor of Student Employees and the Microforms Supervisor, with the approval of the Department Administrator. Student employees are trained to provide service both at the Information Desk and in the Microforms Area (see III.A, III.C, and III.F). Students are scheduled for up to 20 hours per week and may be asked to work day, evening, and weekend shifts. In general, part of each shift is spent at the Information Desk and part in the Microforms Area. During specified periods, students at the Information Desk provide coverage at the Microforms Desk during the Microforms Attendant's breaks.

In addition to providing service at the Information Desk, Student Employees are expected to revise in the Title and Subject Catalogs (see II.A.4), reshelve books, return catalog drawers, and work on long-term

projects assigned by the Coordinator of Student Projects and short-term projects assigned by the Librarian on duty. Projects to be performed in Microforms are assigned by the Microforms Area Supervisor. Librarians who have suggestions for student projects should refer them to the Coordinator of Student Projects.

Within a given shift, Student Employees are responsible to the Reference Librarian on duty and are under the direction of the Microforms Supervisor for work performed there. However, the Supervisor of Student Employees has overall responsibility for the supervision of Information/Microforms Student Employees.

Information/Microforms Student Employees are evaluated each semester by the Reference Librarians and the Microforms Supervisor. Students see the evaluation and have the opportunity to respond to it. The evaluation becomes a part of the student's employment record.

D. Other Student Employees

The Data Base Services Student Employee is hired upon recommendation by the DBS Librarians (with the approval of the Department Administrator) and is trained, scheduled, supervised, and evaluated by the DBS Librarians.

Student Employees in Interlibrary Loan are hired upon recommendation by the ILL Librarian (with the approval of the Department Administrator) and trained, scheduled, supervised, and evaluated by the ILL Librarian or by a Civil Service Employee designated by the ILL Librarian.

The Loose-Leaf Services Student Employee is hired upon recommendation by the Supervisor of Loose-leaf Services (with the approval of the Department Administrator) and is trained, scheduled, supervised, and evaluated by the Supervisor.

E. Civil Service Employees

Civil Service Employees' duties are assigned by the Library Administration and the Department Administrator.

Civil Service Employees in Interlibrary Loan are supervised and evaluated by the ILL Librarian.

The Microforms Area Supervisor is supervised and evaluated by the Reference Department Administrator.

III. REFERENCE SERVICES

A. Information Desk

The Information Desk is generally staffed by a Reference/Microforms Student Employee; however, at times it is staffed by a Reference Librarian, a Reference Intern, or a Civil Service Employee.

The purpose of the Information Desk is to provide answers to informational or directional questions, using the resources of the Card Catalog, the Serials Holdings List, and the materials available at the Information Desk. While providing answers to questions, emphasis should be placed on teaching the patron to be a self-sufficient library user. Explanations should be given on how to use the Card Catalog, Serials Holdings List, L.C. Subject Headings, Microfiche Circulation Record, etc., but then patrons should be encouraged to use these items on their own.

For questions that go beyond the sources available at the Information Desk, patrons should be referred to the Reference Desk.

Information Desk personnel also assist patrons with ILL and DBS when those offices are closed. See policies related to ILL and DBS.

A Librarian or Intern who is working alone should sit at the Information Desk and provide both Information and Reference services.

B. Reference Desk

The Reference Desk is staffed by a Librarian and/or Reference Intern. During the regular semesters, Reference service is available from 8 a.m. to 11 p.m. Monday-Thursday; 8 a.m. to 9 p.m. on Friday; 9 a.m. to 5 p.m. on Saturday; and 1 p.m. to 9 p.m. on Sunday. During interim periods and the Summer Session, hours may be altered.

The purpose of Reference assistance is to aid and instruct patrons in developing search strategies for research projects and in finding specific bits of information. While at times the Librarian may find answers to specific questions for patrons, the emphasis should be on teaching the patron to become a self-sufficient user.

Patrons should be led to materials located within the Reference Collection, and, if necessary, instructed in how to use these materials.

Librarians may work on projects and read professional literature at the Reference Desk, but patrons should never be made to feel that they are "interrupting the librarian."

C. Mail Requests

On occasion the Reference Department receives mail requests for reference assistance. All such requests are first directed to the Departmental Administrator who then passes them along to the appropriate subject specialists.

Not all such requests need to be honored. In general, the policy is not to provide information for the general public that can be readily obtained at local libraries unless the question can be answered quickly and briefly. Questions that would require a major amount of research may also be sidestepped. In general, Librarians should not provide a level of service for postal patrons significantly greater than that given to in-person patrons. All correspondence, however, should be answered, with appropriate referrals to local libraries and/or explanations of why the answer(s) cannot be supplied.

Mail requests should be answered as promptly as possible, preferably no more than one week after receipt.

The library will not normally supply more than five pages of photocopied material as part of a reply, within the limits of the copyright law. If more copying is necessary, bibliographic information about the source should be supplied to the inquirer, with the suggestion that the material be requested through interlibrary loan.

Replies are written on Golda Meir Library letterhead and signed by the Librarian handling the request. The original letter and a copy of the reply are kept in the Reference correspondence file.

D. Telephone Service

1. Answering Telephone Calls

The telephone should be answered as quickly as possible. However, in-person patrons have priority, and the caller should be asked to wait if another patron is being served. The phone should be answered with the phrase, "University Library -- Information Desk."

2. Transfer of Telephone Calls

If the caller needs to be transferred to another number, explain that you are going to transfer the call, give the patron the number in case the transfer doesn't work, push the disconnect button once for about a second, listen for the dial tone, then dial the four digit extension number. Explain to whoever answers that you are transferring a call, then push the disconnect button once for about a second to complete the transfer. When the transfer has been made, tell the parties to go ahead and then hang up.

If the extension you are trying to transfer to is busy, reconnect the caller by pushing the disconnect button once, explain that the line is busy, and make sure that the caller has the correct number to dial at a later time.

Calls originating within the University cannot be transferred. Give the caller the correct number to dial.

Certain extensions cannot be transferred to, such as Microforms and Shelflist. These extensions are marked with an asterisk on the library telephone chart. If the patron needs information from these areas, offer to get it and call the patron back.

Patrons should not be transferred to the Magnadex number, nor should that number be given out. Offer to obtain the needed information and call the patron back.

3. Information Questions

Questions which can be answered using the Card Catalog (Author and Title), the Serials Holdings List, or the resources available at the Information Desk may be answered by the Information Desk personnel. There is a three title limit for items in the Card Catalog, the Serials Holdings List, or a combination of the two. For other information questions, answers should be limited to what can be found and relayed in approximately three minutes.

4. Reference Questions

All telephone questions that go beyond the resources of the Information Desk should be referred to the Reference Librarian or Intern on duty.

Because of the nature of the Reference Collection and the limitations on staff time, the Reference Librarians cannot provide extensive telephone reference service. However, telephone reference questions which can be answered fairly quickly (approximately three minutes) using the resources of the Reference Collection will be accepted. During busy periods or if the appropriate source is in use, the Librarian on duty may offer to call the patron back at a more convenient time with the answer. For questions inappropriate to our library, callers should be referred to an appropriate library. For questions too complex to be answered within a reasonable amount of time, the callers should be asked to come to the Library for further assistance.

E. Interlibrary Loan (ILL)

1. Eligibility

Interlibrary loan service is available to all faculty, staff, and currently enrolled students at UWM. Undergraduates may use interlibrary loan, but they should be reminded that most materials require a minimum of two weeks

to obtain. (If the material is not available in the state, a faculty signature is required to continue the process. Remind the student that his/her request may be returned for a faculty signature.) Special permit patrons are not eligible for ILL; suggest that they request ILL service at their public library. Graduate students of UWM who are not currently enrolled should contact the ILL Librarian during business hours.

2. Filling Out Forms

The patron should fill out a GREEN card for dissertations, books, and other monographic materials. Masters theses and doctoral dissertations should be clearly identified as such, with the university and year as the publisher and date of publication. IVORY cards are used for articles from journals or conference proceedings as well as entire volumes of journals and runs of newspapers. Have the patron complete all of the indicated areas on both sides of the form. It is essential that the patron provides the date of publication. If patrons have incomplete information, ask them to check BIP or NUC. If the citation cannot be found quickly, the Librarian may still accept the form, but should warn the patron that the request may be returned for additional information. GREEN and IVORY request forms are available in the ILL Office and in the bottom drawer of the Information Desk filing cabinet.

3. Accepting Forms

When the ILL Office is closed, request forms can be accepted only by the Reference Librarian/Intern on duty.

Check to see that the request is on the correct form (GREEN=books, IVORY= articles), that both sides of the form have been completed, and that the handwriting is legible. If the signature is illegible, ask the patron to print his/her name above the signature. Each article or book should be on a separate form (i.e., four articles, four forms). Patrons requesting large amounts or unusual materials (e.g., ten years of a newspaper, 25 journal articles, pre-1800 imprints) are encouraged to turn their requests in during business hours so that the ILL staff can advise them of potential problems with copyright or availability. The remarks section should be used for such information as "need by fall term" or "library copy is missing." WE CANNOT GUARANTEE THAT MATERIAL WILL ARRIVE BY A GIVEN DATE. Encourage patrons with less than a week deadline to try other local libraries. When the request form has been filled out properly and completely, place it on the front desk in the ILL office.

4. Retrieving Materials

During business hours patrons should be referred to the ILL staff. When ILL is closed, any Reference staff member can retrieve materials for a patron. A key to ILL is available in the Reference Office filing cabinet.

Photocopies (articles) are in envelopes, arranged by patron's last name on the top shelf, second section of the ILL bookcase. Give the patron the entire envelope; the material belongs to the patron and does not need to be returned.

Loans (books) are arranged by patron's last name on the ILL bookshelves. Have the patron sign the 3x5 card (inside cover) and put the signature card on the front desk. Remind the patron of the due date and that the material should be returned to the ILL Office, or to the Information Desk if ILL is closed. "For Use in Library" materials are marked with special slips. Have the patron sign the card and put the card on the shelf in place of the book. Tell the patron that the book may not be taken from the Library and that it must be returned before the Reference/Information Desk closes. Exceptions are handled only by the ILL Librarian during regular business hours.

5. Information on Requests/Renewals

Patrons needing extensions on loans or with questions regarding their requests should contact the Interlibrary Loan Office during normal business hours (M-F, 8 a.m. to 5 p.m.) either in person or by phone (963-4493). Because Interlibrary Loan materials are not the property of UWM, renewals are granted only with the approval of the lending library.

6. Receipts

Some patrons may request receipts for returned items. Receipt forms are available both in the ILL Office and with the blank request forms in the Information Desk filing cabinet. Any Reference staff member who accepts returned material may issue the receipt.

F. Data Base Services (DBS)

1. Eligibility

DBS is an at-cost service available to all faculty, staff, and currently enrolled students at UWM and other area colleges. People from outside these groups are also eligible for service, but they may be asked to pay a surcharge.

2. DBS Requests

Data base searches may be initiated in two ways: an interview with the DBS Librarian or a written request. Interviews are by appointment, and APPOINTMENTS CAN ONLY BE SET UP BY THE DBS STAFF. DBS request forms are available both in the DBS office and the bottom drawer of the Information Desk filing cabinet. Patrons who request a form should always be told that they have a choice between the written request and an interview with the DBS Librarian. Completed forms should be turned into the DBS personnel or to the Reference Librarian on duty if DBS is closed. The Librarian should check the form for completeness, then put it on the DBS Librarian's desk.

3. DBS Telephone

If DBS is closed during its normal hours of operation (M-F 8 a.m. to 4:30 p.m.), the DBS phone (5045) should be switched to the Information Desk by dialing 121-4659 on the DBS phone. When switching it back to DBS, 122 is

dialed on the DBS phone. The second DBS phone is never switched. When DBS calls come to the Information Desk, student employees can check to see if a print-out has arrived. Other questions about DBS should be referred to the Reference Librarian on duty. Callers who want to make appointments should be asked to call back when a DBS staff member is available.

4. Retrieving Completed Print-outs

Completed print-outs are in the middle drawer of the middle cabinet in DBS, filed alphabetically by patron name. If a cost is listed on the envelope, a check made out to UWM for that amount must be collected before the print-out can be delivered. A receipt from the UWM cashier for the correct amount is also acceptable. Retain the cashier's receipt or photocopy it if the patron prefers to keep the original. The check or receipt should be placed in the upper left hand drawer of the rear desk in DBS. When the name on the check or cashier's receipt is not identical with that on the print-out, write the print-out name on the check/receipt so that proper credit can be given.

Additional remarks that may occasionally be written on the print-out envelope may be ignored. For example, do not withhold a print-out marked "incomplete."

When the DBS office is closed, Reference Staff members may retrieve print-outs for patrons. A key to the DBS office is located in the Reference Office filing cabinet, second drawer.

Patrons who need help in interpreting a print-out should be referred to the Reference Librarian on duty.

G. Microforms Area

1. Policies and Procedures

Policies and procedures for the Microforms Area may be found in the "Microforms Policies and Procedures Manual."

2. Indexes to Materials located in the Microforms Area

The Library's present policy is to purchase or retain only one copy of a microforms index; it is usually cataloged as (MFC) and shelved in the Microforms Area. There may be exceptions. If an index is used heavily and/or requires in-depth interpretation, it will be considered for location in the Reference Collection. If the Library owns multiple copies of an index, they may be located in (MFC), (REF), and the general stacks.

H. Bibliographic Instruction

1. Displays

The flat display case outside the Reference Room doors and nearest to the security station is at the disposal of the Reference Department for displays. The Coordinator of Displays (appointed by the Department Administrator) is responsible for overall scheduling, but the entire Reference Staff bears responsibility for planning and execution of displays.

Displays should have some relationship to the services and resources of the Reference Department. Ideally, displays should be changed once a month, although some may be shown for shorter or longer periods depending upon the timeliness of the topic. Within the boundaries of our limited resources, displays should be as attractive and informative as possible.

At various times during the year, the display case will be needed by other units within the Library. These times should be scheduled as far in advance as possible with the Coordinator of Displays, and, if necessary, such uses should be approved by the Assistant Director for Public Services.

2. Bibliographies

Reference Librarians may develop short subject bibliographies for use in specialized orientations. These will be kept on file in the Reference Office for use by other Librarians.

Extensive bibliographies on demand are not within the scope of Reference Department service.

3. Orientations

Any Reference Librarian may take an orientation request. Orientation forms are located in the bottom drawer of the Reference Office filing cabinet and should be filled out as completely as possible to reflect the wishes of the instructor. The time and date should be checked on the calendar to make sure there are no conflicts, and the Librarian taking the request should reserve either Room 281 or Room 301 and order the appropriate equipment.

The completed form goes to the Coordinator for Bibliographic Instruction, who assigns a Librarian to give the orientation. If the Coordinator is not available, the request should go to the Departmental Administrator, or the person taking the request should make the assignment. For general orientations, the assignments are distributed as evenly as possible among the Reference Librarians. For specialized orientations, the Librarian with the most appropriate background is the first choice.

Once the assignment has been made, the orientation is marked on the calendar, a photocopy of the request form is given to the assigned Librarian, and the original is retained by the Coordinator.

No more than four orientations will be scheduled during any day shift, and preferably no more than three.

Ideally, there should be at least a week's notice in order to set up an orientation, but exceptions may be made at the discretion of the Reference Librarian taking the request.

Orientations may take place outside the Library when the size of the class or the unavailability of a room makes it impossible to hold the session at the Library.

Classes may be taken to Reference and/or Microforms as part of the session, but a general tour will not be provided.

Orientations for groups outside of the University community must be approved by the Assistant Director for Public Services.

The Coordinator of Bibliographic Instruction submits statistical reports concerning orientations to the Department Administrator at the end of each semester. These reports and other materials related to the instruction program are kept on file in the Reference Office.

The Coordinator of Instruction is authorized to contact faculty members if there are difficulties with particular assignments.

4. Reference Pamphlets

As the need arises, Reference Librarians develop pamphlets detailing search strategy for finding information in the Golda Meir Library (How to Find Book Reviews, Periodical Indexes and Abstracts, How to Use the Card Catalog, etc.). The Department Administrator appoints a Librarian to oversee the production of pamphlets, and they are periodically updated, revised, or discontinued, depending upon their usefulness to patrons.

A small supply of all the available pamphlets is kept in the Reference Office and behind the Information and Reference Desks. The rest are kept in the storage area, West Wing, Lower Level.

5. Tours

The Coordinator of Bibliographic Instruction schedules general tours of the Library, usually during the second week of the Spring and Fall Semesters. The Coordinator is responsible for publicizing the tours, arranging for tour leaders, and submitting statistical reports to the Department Administrator.

Requests for special tours should be referred to the Coordinator of Bibliographic Instruction. Those from outside the University must be approved by the Assistant Director for Public Services.

J. Special Services

1. Checking Out Reference Materials

The Reference Collection is non-circulating. However, at the discretion of a Reference Librarian/Intern, some items may be checked out for a limited period of time. Undergraduates may check out a Reference book for two hours; faculty, staff, and graduate students may check out a Reference book for overnight use.

Forms for check-out are located in the Reference Desk drawer. Forms are filled out in duplicate: one stays with the book and the other is filed in the drawer. The borrower should be told to have the book desensitized at the Circulation Desk before leaving the building so that it can pass through the book theft detection system. The returned book should be brought to the Reference Desk and both copies of the check-out form destroyed. The Librarian on duty should then take the book to the Circulation Desk to be resensitized.

2. Complaints/Suggestions

When a patron has a complaint, Reference Staff members should make every effort to be courteous and helpful. Student staff members should always refer the problem to the Reference Librarian on duty. When the complaint/suggestion concerns Reference Department policy or procedures, this Manual should be consulted as the authoritative reference source.

If the Librarian on duty is not in a position to resolve the complaint, the patron should be referred to an appropriate supervisor. If the appropriate supervisor is unavailable, offer to take the patron's name, address, and phone number and have the supervisor contact the patron.

Patrons who would like to contribute suggestions concerning the Library should be referred to the Library Comment/Suggestion Box, located on the far West end of the Circulation Desk near Room the Reference room. "Patron Response" forms for comments or suggestions are available next to the box. Suggestions concerning any area of the Reference Department can be referred to the Reference Department Administrator.

3. Government Documents

Scope: The Golda Meir Library is a partial depository for U.S. Government Documents. Selection is based predominantly on curricula needs.

Arrangement: Most hard copy documents are fully cataloged and shelved in the general library collection. Uncataloged documents are arranged by SUDOCS number on the documents shelves in the Reference Room. Reference-type documents are added to the Reference Collection upon recommendation by the appropriate Librarian.

Shelflist: The Documents shelflist is the master file of depository materials available in the Library, no matter where the location or what the format. It is arranged by SUDOCS number and gives LC call numbers for those items that have been cataloged, including Special Location Symbols, if used.

The shelflist is not a public catalog, nor is the documents staff a public service staff. Patrons should not be referred to either. The Reference Librarian on duty should check the shelflist for holdings when patrons have SUDOCS numbers and assist patrons who are having difficulties in locating materials on the documents shelves.

Microfiche Documents: Documents printed on microfiche are currently available in one of three places: the Microforms Area; a cardboard box on the top shelf of the Documents bookcase; and the serials cataloger's office. All microfiche documents are listed in the shelflist by SUDOCS number, and the card is labeled MICROFICHE in the upper right-hand corner. If (MC) (DOC) appears above the SUDOCS number, the material is available in the Microforms Area and the patron should be directed there. "In Docs" pencilled on the card refers to the cardboard box, and "In PROCESS" indicates the serials cataloger's office. Materials in either of these categories should be retrieved for the patron by the Reference Librarian on duty. The microfiche should be checked out to the patron using a Reference check-out form available in the Reference Desk drawer. The patron should be instructed to return the microfiche to the Reference Desk. Then both copies of the check-out form can be destroyed. The microfiche should be promptly returned to the appropriate place by the Reference Librarian on duty.

Circulation: Documents with LC call numbers follow the same circulation policy as the rest of the collection (i.e. monographs circulate, serials do not, etc.). Materials arranged by SUDOCS number on the documents shelves also circulate and may be checked out at the Circulation Desk. Documents on microfiche follow the same circulation policies as other microfiche materials.

4. Handicapped Assistance

In addition to the services extended to any patron, the Reference Staff will provide the following services to handicapped patrons, if needed:

a) Locating up to three titles in the Card Catalog or Serials Holdings List.
b) Checking up to three call numbers in the Microfiche Circulation Record.
c) Removing Card Catalog drawers and other reference materials to a more convenient location for the patron to use.
d) Providing assistance in loading and unloading all readers in the Microforms Area and assistance with reader/printer photocopying, as time permits.

Additional help may be given, as time permits, including a small amount of photocopying.

For retrieval of non-Reference materials, handicapped patrons should be referred to the Circulation Desk.

If at any time a handicapped patron needs more assistance than the Reference staff can provide, the Librarian may suggest the aid of a friend or the contacting of Disabled Student Services (E Building, 2002 E. Kenwood Blvd., 963-6287).

5. Infopasses

An Infopass is a written authorization for a UWM patron to borrow specific materials from another LCOMM library or to have access to that library.

Who issues Infopasses? Reference Librarians (Reference Services, DBS, ILL) and Reference Interns are the only staff members authorized to issue Infopasses.

Who is/is not eligible to receive an Infopass? Infopasses are issued to currently enrolled UWM undergraduates and graduate students, faculty, and staff. Infopasses are not issued to patrons who hold special borrower permits. Exception: Recently graduated graduate students who are still doing research may be issued a special borrower permit. They are eligible for Infopasses.

Because the Golda Meir Library is ultimately responsible for materials loaned out on an Infopass issued here, identification should be checked.

Materials that may be requested on an Infopass:

a) Materials not listed in the Card Catalog
b) Materials listed in the Card Catalog, but:
   - Sent to the bindery
   - Listed as missing (i.e., REPLACE on the Microfiche Circulation Record)
   - Overdue beyond four weeks
   - Missing and searched by Circulation for two weeks

Exception: If searches and/or notices are in progress and the patron gives a valid reason for needing the material, the Infopass may be issued at the discretion of the Reference Librarian on duty.

Materials that may not be requested on an Infopass:

a) Materials owned by the Golda Meir Library
b) Materials in a subject category. Infopasses will be written for specific titles only.

Writing the Infopass: Infopass forms are available in the Reference Desk drawer. Check to make sure that both the patron and the material meet the eligibility requirements. Call the lending library (for the phone number, see the Infopass Interlibrary Loan Policies Directory -- (REF) Z 713.5 .U6 L5x 1979

located at the Reference Desk) to confirm that they do own the desired item and that it is available. Be sure to get the call number.

Fill in the Infopass completely. Write no more than three titles per Infopass and only one Infopass per transaction. Retain the last sheet of the Infopass form (green) and place it in the box on the Reference Office bookshelves. Tell the patron to present the remaining portion of the form at the circulation desk of the lending library.

6. Machine Repairs

Copy Machines: When a patron reports that a copy machine in Reference is not working, explain that copiers are available on other floors and wings, that refunds for lost money are available at the Circulation Desk, and that Reference materials may be removed from the room for copying. Ask patrons to return Reference materials to the room when they have finished copying them. Place an "OUT OF ORDER" sign on the copier. Copy machines are checked periodically throughout the day.

Microfiche Reader: Report any problems to Equipment Distribution, extension 5527.

Telephone: Report any problems to the Business Office, extension 6291.

OCLC: Report any problems to the OCLC supervisor, extension 5398.

7. Serials and Shelflist Information

Patrons needing serials information from serials control records or bibliographic information from the shelflist should not be referred to those departments directly nor be given the telephone numbers. During Library business hours (M-F, 8:00 a.m.-4:30 p.m.), the Reference Librarian on duty should call a check-in person for the needed information and relay it to the patron.

Patrons who request information during evenings and weekends when shelflist and serials control records are unavailable should be asked to call back during normal business hours.

8. OCLC

If a patron cannot locate a title or a book or journal in an easily accessible source such as the Card Catalog, Books in Print, or Ulrich's International Periodical Directory, then the Reference Librarian on duty or the Reference Intern can perform an OCLC search to verify the title's existence and/or determine the location.

The following limitations are placed on the OCLC terminal:

- Searches performed by Reference Librarians or Interns have precedence over those of other users.
- Library staff members from outside the Reference Department are encouraged to use other OCLC terminals, since searches on the Reference terminal are charged on a more expensive fee schedule.

9. Requests for New Purchases, Monographic or Serial

All patron requests for new purchases should be directed to the Assistant Director for Collection Development. Request forms are available on the top shelf of the reference office bookshelves. Either the patron can turn the request in to the Acquisitions Department secretary or the Reference Librarian/Intern can accept the request and deliver it to the secretary for the patron.

10. Requests for Yet-to-be Cataloged Books and Materials

Patrons may inquire about the availability of on-order titles listed in the Title Catalog. If the book has arrived, Reference staff members can initiate a "Special Handling" or "Rush" to speed up the cataloging. The patron should be informed that the "Special Handling" will take ten days to two weeks. If the material is needed before then, the patron may not wish to pursue the "Special Handling," in which case Reference Staff members can assist in locating alternate material.

How to Determine if an On-order Title Has Arrived

If the order card is stamped SENT TO CAT, the book is in the Cataloging Department.
If the order card is not stamped SENT TO CAT, the book may still be here.
Check with the Acquisitions staff. They can determine the status of the book.

Who is Eligible for "Special Handling" Procedures (Blue Slip)

Currently registered UWM undergraduate and graduate students, faculty, and staff are eligible for "Special Handling." Patrons with special borrower permits are not.

Who is Eligible for "Rush" handling (Pink Slip)

UWM faculty members who want the material placed on Reserve.
UWM Administration members and UWM committee members.

Procedure for Submitting the Request: After determining that the title is available and that the patron is eligible for the "Special Handling" or "Rush" procedures, have the patron fill out a yellow HOLD card (author and title on one side, name and address on the other). Photocopy the order card and fill out either a blue "Special Handling" slip or a pink "Rush" slip. (HOLD cards and blue slips are available in the Reference Desk drawer. Pink slips are obtained from Acquisitions). Staple the photocopy, HOLD card, and pink or blue slip together and place in the box on the telephone desk in the Reference Office, where it will be picked up by the person responsible for searching out the titles.

Tell the patron that when the book is cataloged, it will be sent to the Circulation Desk and the HOLD card will be mailed. The patron should present the HOLD card when picking up the book.

K. Services not Provided

The following services are not provided by the Reference staff:

- Taking responsibility for patrons' possessions.
- Accepting materials, packages, etc. to be picked up by others.
- Making change.
- Checking the general stacks on a phone request to determine if an item is present.
- Putting aside materials on a phone request for later pick-up.
- Proctoring exams.
- Consulting sources not housed in the Reference Room, especially on a phone request.
- Furnishing supplies: paper, envelopes, pens, Scotch tape, scissors, hole punch, etc.

Exception: The Reference Department does provide small red pencils, slips of paper for jotting down call numbers, and staples/staplers.

IV. REFERENCE COLLECTION

A. General Collection Policy

Reference Librarians are responsible for Reference Collection development in their assigned subject areas.

Materials are acquired for the Reference Collection in three ways:

1. Reference type materials that come on blanket orders or as gifts are directed to the appropriate Reference Librarian by the Assistant Director for Collection Development. The Librarian decides whether or not to add these items to the Reference Collection. If an item is to be added, fill out a green slip (available on the top shelf of the Reference Office bookshelves), insert it in the book, and place the book on the Acquisitions work table. If the item is not be added, write "GNS" (General Stacks) on the request form and return the book to the worktable.

2. Certain vendors send approval slips to the Acquisitions Department, and those for Reference materials are directed to the appropriate Librarian. The approval slip with a written yes or no decision attached is returned to the Assistant Director for Collection Development. There is no guarantee, however, that the item will be purchased. The Librarian's decision is merely advisory.

3. Reference Librarians may submit requests for specific items. See section IV, D, 2 for details.

The following guidelines are used for acquisition/retention of materials in the Reference Collection:

1. In general, the basic reference sources for a discipline offered at UWM will be found in the Reference Collection: indexes, abstracts, dictionaries, encyclopedias, directories, etc. Subject bibliographies, text-books, and other very specialized sources will not be designated for (REF).

2. With only a few exceptions, the entire holdings for any index or abstract assigned to the Reference Collection will be shelved in Reference.

3. All volumes of reference sources that are supplementary to previous volumes or editions will be retained in Reference.

4. Only the latest reference sources that are revisions of earlier editions will be retained in Reference.

5. With the exceptions of some general encyclopedias, general indexes, dictionaries, statistical abstracts, and national bibliographies, foreign language materials will not be assigned to Reference.

B. Specific Collection Policies

1. Annual Reports

The Library maintains a select collection of hard copy business annual reports arranged alphabetically in filing cabinets at the West end of the Reference Room. They are kept for the last five years only.

Guidelines for retention in the collection are:

a) Companies listed on the New York or American stock exchanges (Check current issues of Standard and Poor's Stock Reports).

b) Any Wisconsin based-company (Check Classified Directory of Wisconsin Manufacturers or Milwaukee Journal list of Wisconsin's largest industries).

c) No foreign-based companies' reports are kept in the collection.

The above categories are not inclusive. The annual reports collection is a limited one, and the Library is not expanding its holdings at this time.

Additional annual reports on microfiche may be found in the 10K Reports in the Microforms Area.

The Librarian in charge of the business collection instructs the students doing the filing to check the incoming annual reports to see if they meet the guidelines for retention. If so, they should be stamped with a Reference Department or UWM Library stamp, labeled, and checked in on the shelflist located at the end of the Subject Catalog. Copy 2 of a current year may be added. Annual Reports older than five years should be crossed off the shelflist and discarded. New cards should be made for added companies.

Annual reports are considered Reference items and do not circulate except under the limited procedure for checking out Reference materials. (See III. H. 1.)

2. Atlases

Three types of atlases are generally designated for the Reference Collection:

a) General world atlases.

b) Atlases for a specific country if the title is an official atlas from the government of the country, or a "quasi-official" atlas prepared for the government or by the U.S. Government.

c) U. S. Atlases.

Atlases not designated for Reference are:

a) Individual state atlases, except for Wisconsin.

b) Older editions of atlases, which are transferred to the General Stacks (GNS) and designated as circulating materials.

c) Foreign language atlases that are not official atlases or do not fill a definite need.

Location:

a) Large atlases are housed in the atlas cases -- the decision is based on size, not subject matter.

b) Atlases of a specialized field that are retained in the Reference Collection may be located in a subject area rather than the "G" classification, based on a mutual decision of the Librarians involved with the two areas.

3. Bibliographies

a) National Bibliographies: Only the U.S. and British national bibliographies are located in the Reference Collection for all years (NUC, BM-BL Catalog, BNB). The most current five years of other national bibliographies will be retained in Reference. Earlier years are transferred to GNS as non-circulating materials. Non-current bibliographies (e.g. Bibliographie Nationale) are located in GNS as non-circulating. Closed serials entries will have the entire holdings transferred to GNS as non-circulating, excluding, however, U.S. and British titles.

National bibliographies which duplicate one another are carefully compared. A recommendation is made to keep only the best/most complete title. Titles not to be continued are transferred to GNS or withdrawn from the collection (see IV.D.8 and IV.D.9). Retention of titles is based on Reference, Acquisitions, and ILL needs.

b) Specialized Bibliographies: Specialized bibliographies are generally located in GNS as circulating materials. Guides to anthologies of often-requested materials (e.g., plays, short stores, criticism, etc.) are generally located in the Reference Collection. These bibliographies should be classed with other related materials.

c) Library Catalogs: In general, the Library does not purchase library catalogs. Exceptions are generally based on academic department demand. These specialized catalogs are not housed in the Reference Collection and may be either circulating or non-circulating. The decision is made by Acquisitions or by recommendation of the Reference Staff, if requested.

d) Books-in-print Type Bibliographies: English language in-print sources are retained in Reference only for the current year. Earlier editions are transferred to GNS as circulating items or are withdrawn from the collection. If multiple copies are purchased for the current year, only one set is retained in the collection when relocated in GNS.

4. College Catalogs

The Library has a large collection of domestic and foreign university and college catalogs on microfiche. These are located in the Microforms Area in the Lower Level, West Wing, and are available to patrons during MF hours. The Library keeps the latest three complete editions plus the current incoming one. Older editions are transferred to Mellencamp Hall for use in the Admissions Office.

Current paper editions from the UW System campuses and some Milwaukee area colleges are housed on the Reference Office bookshelves and may be requested at the Information Desk. These materials do not circulate.

5. Dictionaries

a) English Language Dictionaries
A wide variety of regular, etymological, slang, colloquial, and dialect dictionaries are housed in Reference.

b) Foreign Language Dictionaries
Monolingual: Only those for major languages are housed in Reference. Etymological dictionaries taking up great amounts of shelf space are shelved in GNS as non-circulating.

Bilingual in English: Those for official languages, languages taught on campus, and those in heavy demand by foreign students are housed in Reference. Placement of dialect and slang dictionaries is at the discretion of the Librarian in charge of the "P" collection.

Foreign language grammar and textbooks, whether mono- or bilingual, are not designated for Reference.

6. Encyclopedias

a) General Encyclopedias ("AE" classification)
The standard general encyclopedias in English and major foreign languages are housed in the Reference Collection. Encyclopedias generally considered to be geared for children and young adults are in the Curriculum Collection. Current editions only are generally retained in the Library, although older editions may be kept in GNS on a selective basis.

Lesser-used foreign language encyclopedias may be housed either in Reference or GNS at the discretion of the Reference Librarian in charge of the "A" collection. Those in GNS are designated non-circulating.

b) Subject Encyclopedias
Subject encyclopedias that cover a relatively wide field of knowledge are generally located in Reference in a subject classification number. The decision is made by the Librarian in charge of the subject area.

7. Indexes and Abstracts

As a viable research library, the Golda Meir Library must maintain the fullest possible access to the research literature of those disciplines included in the mission of the University.

Therefore, the Reference Staff endorses the following policy for the purchase/retention of printed indexing and abstracting services:

a) The indexes/abstracts should support the curriculum at UWM.

b) Indexes/abstracts with unique coverage, by discipline or language, of journals not indexed by alternative services should be purchased/retained.

c) When two indexes/abstracts overlap in a subject area, both will be purchased/retained if they are necessary for serving the diverse needs of UWM undergraduates, graduate students, and faculty.

Indexes/abstracts have a high priority for purchase/retention and should not be cancelled solely on the basis of usage.

8. Telephone Directories

To give better service to UWM faculty and students and to aid the Acquisitions and other Library departments in ordering procedures, the Reference Department maintains a limited collection of current telephone directories.

The collection is limited to cities in the U.S. over 500,000 population (approximately the 25 largest cities), Wisconsin communities outside the 414 area over 30,000 population, and those communities with UW campuses. All directories within the 414 area (which are free) also are maintained. Suburban phone books for large metropolitan areas, with the exception of Chicago and New York, are not acquired. Foreign directories, with the exception of a few major cities in Canada, are not collected.

Telephone books are received directly by the Reference Department, checked in and stamped by the Loose-Leaf Services student employee, and placed on the Index Table. A card file is kept giving the date of receipt and cross indexing information for cities held. Analytical entries are made for Wisconsin cities only. Superceded directories are withdrawn from the collection.

C. Location Policies

1. Classification Selection

In general, materials designated for the Reference Collection are housed according to the call number assigned by the Library of Congress. However, at times Reference personnel may ask for a book to be reclassified in order to keep related materials together or to prevent a book being "lost" (i.e., overlooked because of its location).

The following guidelines are used for reclass requests:

a) "Z" books often have an alternative classification for the appropriate subject area. A mutual location decision is made by the "Z" Librarian and the subject Librarian based on the content of the book and the location of other related materials. "Z" books without an alternative classification may also be considered for reclass.

b) Sources dealing with graduate study and graduate schools are reclassified to the "L" collection rather than housed in the subject area.

c) All career guides are reclassified to "HF."

d) Awards and grants materials are reclassified to "LB."

e) Within a given subject area, requests for reclassification can be made by the subject Librarian in order to keep related materials together or, in some cases, to keep successive editions of a title together.

Requests for reclassification are made to the English language monographic cataloger.

2. Indexes and Abstracts

Because of space limitations, not all indexes and abstracts owned by the Golda Meir Library can be housed in the Reference Room. Some of the more heavily used indexes/abstracts are located on the Index Tables; others are in the Reference stacks by call number; and still others are in the general stacks.

For the following titles, only the most recent period of years is housed in Reference:

- Biological Abstracts: 20 years; older volumes in GNS
- Dissertation Abstracts: 10 years; older volumes on microfilm

3. Reference Material on Temporary or Permanent Reserve

Some Reference books that get heavy usage or have a high loss rate may be put on permanent Reserve. The Librarian in charge of the subject area, in consultation with the other Reference Librarians, makes the decision to transfer the item.

When a request is made by a faculty member to put a Reference book on Reserve, the subject Librarian must approve the request. In general, there must be a demonstrated, overriding need to put this material on Reserve, especially if it is a portion of an index, abstract, encyclopedia, or other heavily used item.

Each Reference book on temporary or permanent Reserve has a Reserve Request card filed in a metal box marked "RESERVE," located in the Reference Desk drawer. These cards are arranged by call number and also list title, author, edition, and the check-out period: two hour, two day, or seven day.

4. Special Reports and Documents

When the Library receives a request from campus departments or local government agencies to have a special report or document available for public use, these reports (usually uncataloged) are labeled and shelved behind the Information or Reference Desk, or in the Reference Office. These documents are kept for a limited time only, determined by their currency and usefulness to patrons.

Reports and documents related to the University are offered to Archives when they are no longer needed in Reference. Those not accepted and others unrelated to the University may be discarded.

5. Reference Materials at the Reference/Information Desks

Small collections of frequently consulted sources are kept at both the Information and Reference Desks. Those at the Information Desk are primarily locational sources: telephone books, city directories, serials lists from other libraries, in-print sources, etc. Those at the Reference Desk tend to be more specialized reference sources. Both collections are available to the public. Materials located at the Information Desk have a green dot affixed on or near the call number label. Materials at the Reference Desk are identified with a red dot.

The desk collections are flexible, and, with mutual staff consent, materials may be added or deleted within given space limitations.

Materials are selected on the basis of:

a) heavy usage by patrons and/or Reference staff
b) susceptibility to theft
c) designation as a location for campus use (e.g., planning documents)
d) frequent or occasional use as a standard reference source.

For single copy sources located at either desk, a plastic sleeve is added to all catalog cards stating "Latest Edition at Information Desk". When desk copies are duplicates of materials located in the Reference stacks (e.g., almanacs), the plastic sleeve is not added.

D. Handling Procedures

1. Binding/Rebinding/Book Repairs

Reference Librarians are responsible for serial and book maintenance in their assigned areas.

Reference Serials: Serials to be bound should be sent out during "quiet" periods of the year and binding may be requested on a "RUSH" basis. Rubber band the portions that should be bound together. Include a photo copy of the spine of a bound edition to insure that the lettering will be uniform.

Reference Books: File a card for all books sent either for rebind or in-house repair. Rebind books should be placed on the book truck in Acquisitions and directed to the bindery supervisor.

Periodically, the Librarians should check the file cards in their subject areas for those items sent to the bindery or for repair. If the item has been returned, the card can be destroyed. If the item has not been returned within a reasonable amount of time, the bindery staff should be contacted.

2. Book/Serial Orders

Reference Librarians are responsible for keeping abreast of new reference materials published in their assigned subject areas and recommending appropriate purchases.

Order forms are available from the secretary to the Assistant Director for Collection Development. Completed order forms should be first submitted to the Reference Department Administrator. The Administrator forwards approved requests to the Assistant Director for Collection Development for consideration. Requests not approved by the Administrator are returned to the appropriate Librarian.

3. Loose-leaf and Updated Material

Loose-leaf and other updated material for the Reference Collection, (TAX) collection, and certain other areas of the Library are handled in the following manner:

a) A Reference Librarian is appointed by the Department Administrator to supervise and be responsible for updating and disposition of outdated materials in the above areas.

b) A student is hired for 15 hours per week to file the material, under the supervision of the Librarian assigned.

   1) New students are fully trained and continually supervised by the assigned Librarian.

2) A manual of instructions and a card catalog arranged by call number is kept up to date by the Librarian and the student.

4. Lost/Missing Reference Materials

When a Reference item appears to be missing, a card is filed in the metal file box on the Reference Office bookshelves.

Reference Librarians are responsible for replacement/withdrawal of missing materials in their assigned subject areas.

If, after a length of time (3 to 6 months), an item does not reappear, then the appropriate Librarian should either withdraw the item from the collection or submit an order form for a replacement copy. (See IV.D.2.)

5. Microfiche Reference Materials

Reference Materials on microfiche are added to the Reference Collection in the same way as any other reference material -- by the decision of the Reference Librarian in charge of the subject area.

Microfiche materials are assigned an abbreviated LC call number and given the Special Location Symbol (REF) (MC) or (ILL) (MC).

Microfiche reference materials are currently housed in a box on the new book shelf in the Reference Office.

A dummy is put in the appropriate place in the Reference stacks to indicate that the material is available and may be retrieved by the Reference Librarian on duty.

Superceded microfiche materials are handled under the same guidelines as any other reference item, except that transferred items are directed to the Microforms Area. (See IV. D. 6 and IV. D. 7.)

For items that will receive very heavy use, two options are possible:

a) Immediate location in the Microforms Area, where there are more readers and reader/printers available.

b) Creation of one or more paper copies for patron use.

6. New Materials Check-in

The Reference Department Administrator designates a Librarian to handle in-coming new materials.

Approximately once or twice a week a truck of new materials arrives in the Reference Office. Included may be loose-leaf binders, annuals, new editions of open sets, new editions of monographically cataloged items, and new titles. Each of these formats is handled somewhat differently.

a) Loose-leaf Binders: Direct to the student loose-leaf filer.

b) Annuals: Date stamp the inside back cover or the first "white" page. Place it in the Reference stacks, remove the superceded volume, and transfer it to GNS. (Transfer slips are available on the top shelf of the Reference Office bookshelves. The book with the completed transfer slip inside and a copy of Serials Holdings List entry should be taken or directed to the CMR [Catalog Modification and Revision] area of Technical Services). Follow the Serials Holdings List instructions concerning retention/withdrawal. If the Annual replaces loose-leaf or paperbound sections, check the file (located on the telephone desk in the Reference Office) to see if the loose-leaf sections are distributed anywhere. If so, direct them to the appropriate place; if not, discard them.

If the Library has two or more copies of a superceded annual, choose the best one for transfer to GNS and withdraw the other(s). If necessary, have the retained volume relabeled "Copy 1."

In general, material transferred out of the Reference Room to GNS should circulate.

Special note should be made of the following annuals:

Biological Abstracts: The Library keeps volumes for the past 20 years in Reference. Once a year, the Reference Librarian appointed stack supervisor should transfer out the oldest year to GNS (non-circulating).

Dissertation Abstracts: The Library keeps volumes for the past 10 years in Reference. Once a year, the stack supervisor should withdraw the oldest year. The earlier volumes are available on microfilm.

National Bibliographies: The Library keeps volumes for the past 5 years in Reference. Once a year, the stack supervisor should transfer the oldest year to GNS (non-circulating).

c) New Editions of Open Sets: Put the edition on the subject librarian's shelf. The subject librarian will complete the following procedures: date stamp the new edition on the inside of the back cover or on the first "white" page. Check the Card Catalog for an open entry (i.e., one card for the entire set and no reference to the IBM Serials Record). Remove the superceded volume from the Reference shelves and transfer the Volume Only to GNS. In most cases, the transferred volume should circulate. (See IV.D.8 for transfer procedure.)

d) New Editions Cataloged Monographically: Date stamp the new edition. Check the Card Catalog to see that there is a separate card for each edition. Remove the superceded edition from the Reference shelves and transfer the Volume and CARD SET to GNS. In most cases, the

transferred volume should circulate. (See IV.D.8 for transfer procedure.)

e) New Titles: Date stamp the volume. Place on the new book shelf in the Reference Office for approximately one month, then transfer it to the Reference stacks. If the book is very ordinary and its use quite apparent (i.e., a bilingual dictionary), it may be placed directly on the Reference shelves.

As new materials are placed on the shelves, verify the call number on the spine with that on the title page and on any previous editions.

Be sure that the call number places the material in the desired position (i.e., make sure that sets or editions are not split in two different places and that the volume is not placed in a call letter area where it will be "lost" or separated from similar materials. (See IV. C. 1.) If there is a problem, return the volume to Cataloging for renumbering or reclassification.

All materials to be withdrawn or transferred to GNS should be taken to CMR. The empty trucks are then to be returned to the typing area of Technical Services.

7. Requests by Faculty for Superceded Reference Materials

When UWM Departments or faculty members want superceded library Reference materials that are normally discarded, write down the title(s), call number(s), faculty member's name and department, and give this information to the Department Administrator. The title(s) will be reviewed by the RPR Committee and all information will be routed to the Assistant Director for Public Services.

If the transfer of material is approved, the information will be noted on the appropriate card in the Loose-Leaf Services file, and the Loose-Leaf Services student employee will route the material to the Department or faculty member.

Superceded materials, except for U.S. Documents, cannot be given to an individual for personal use.

8. Transfers

The Reference Room has a finite amount of space, and, as a result, various classes of materials need to be transferred out to make room for incoming items.

Transfer forms are available on the top shelf of the Reference Office bookcases. For a monograph being transferred, fill out the transfer form completely, insert it in the book, and either place the item on the truck in Acquisitions or take it directly to CMR (Catalog Modification and Revision). For a serial, fill out the transfer slip and also include a photocopy of the Serials Holdings List entry.

For specific information on transfer of particular classes of materials (e.g., annuals, open sets, etc.), see the handling policies for these classes.

For materials to be withdrawn from the collection, follow the policy on weeding (see IV. D. 9).

Materials may also be transferred from the general stacks to Reference. Give the item to be transferred and the completed transfer form to CMR.

9. Weeding

Reference Librarians are responsible for removing out-dated or little used materials from their assigned areas of the Reference Collection. However, the other Reference Librarians should be consulted to make sure there are no objections to removal of specific items.

For materials to be transferred to the general stacks, the procedure outlined in IV.D.8 should be followed. If the material is listed in the Serials Holdings List, the Librarian making the transfer is responsible for making sure the Serials Holding List reflects the change.

For the last copy of an item which is to be withdrawn from the collection, use the following procedure:

a. For a serial, check the retrospective serials holdings of other Milwaukee and Wisconsin libraries.

b. Determine if there is Interlibrary Loan or other internal library use of the item.

c. Check with appropriate subject specialists either in the Library or on campus.

d. Obtain written agreement of 3/4 of the Reference Department Librarians, including the Departmental Administrator and the Assistant Director for Public Services, to withdraw the item.

e. Send the withdrawal request to the Assistant Director for Collection Development for review.